

Appendix IV. Accessing the Monthly SS/SSI Reports

The TASS Online System allows users to access Benefit History and Income Discrepancy Reports generated from the monthly Social Security and Supplemental Security Income match conducted by TASS for households due for re-certification in the next four months. The system also identifies the tenants for whom SSA was unable to provide benefit information and the reason for the missing information.

The **Benefit History Report** shows the current level of benefits and a history (up to the last 8 changes) for each family member. The Benefit History Reports include benefits information for all household members due for re-certification in the indicated month for whom SSA provided benefit information.

The **Income Discrepancy Report** is generated for households due for re-certification and having a discrepancy between the monthly SS/SSI benefit amount reported by SSA and that reported by the household. The household is considered discrepant if the combined tenant-reported amount for all household members differs from the SSA-reported amount by \$50 or more.

The **Error Report** provides information on family members in a household due for re-certification for whom SSA was unable to provide benefit information and the issues encountered by SSA in resolving the tenant information or providing the benefits data.

The reports that are available to the user are determined by the POAs that have been assigned to the user by the Secure Systems Coordinator. A PHA user may search for and view reports by two criteria: PHA or Household. An O/A user may search for and view reports by three criteria: Household, FHA Project Number or FHA Contract Number.

Sections A, B, C, and D of this Appendix describe how to search for the monthly reports by household, PHA, FHA Contract Number, and FHA Project Number respectively. Section E describes how to access the detailed Benefit History and Income Discrepancy reports generated in the search results.



A. Accessing Monthly Reports by Household

TASS allows the user to request tenant benefit records for a specific household using the Head of Household's (HoH) Social Security Number (SSN). A search by HoH SSN will yield, at most, one record because the SSN identifies only one specific household. Use the following steps to search by household:

1. Click the **by household** link under the Benefit History Reports section of the system menu.

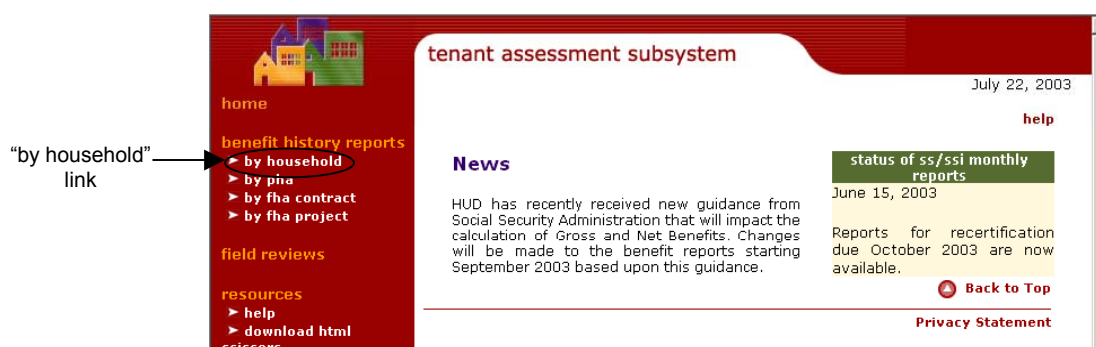
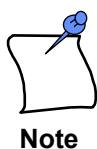


Figure 9. TASS Home Page



Note

POAs may not view the tenant data without a signed Authorization for the Release of Information/Privacy Act Notice (Forms HUD-9886, HUD-9887, or HUD-9887A) in the household's file for the head of household and spouse or co-head, regardless of age, and each adult member in the household.

2. The **Monthly Reports by Household** screen is displayed as shown below.

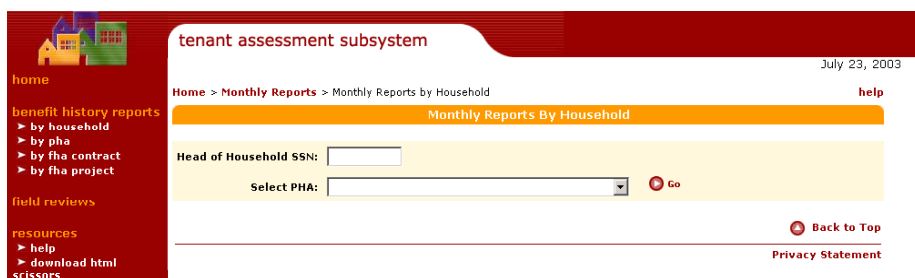
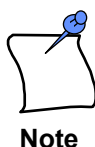


Figure 10. Monthly Reports by Household Search Screen



3. To specify the household for which you want to access the benefit records:
 - Enter the **HoH SSN** in the text box. (Do not include dashes in the SSN.)
 - Select a **PHA** from the drop-down list of authorized PHAs
 - Click the **Go** link



Note

Instead of a list of PHAs, an O/A user would be presented with drop-down lists of the Project and/or Contract Numbers they are authorized to access.

If a PHA, Project, or Contract that you need to access does not appear in the drop-down list of authorized PHAs/Projects/Contracts, you should contact the Secure Systems Coordinator of your POA, who is able to grant you the necessary rights.

4. The **Household Income Summary** for the household is displayed as shown below.

tenant assessment subsystem

July 23, 2003

Home > Monthly Reports > Monthly Reports by Household > Summary by Household

help

Household Income Summary

PHA	Re-certification Month
'LA001' - HOUSING AUTHORITY OF NEW ORLEANS	September, 2003

HH SSN: 123-45-6789 | HH Name: JOHN TENANT

[View Benefit History](#)

Member SSN	Member Name	*SS Gross Net	**SSI	*DE	Total Gross Net
123-45-6789	JOHN TENANT	\$197.00 \$197.00	\$0.00	\$0.00	\$197.00 \$197.00
123-45-7777	MARIA TENANT	\$501.00 \$501.00	\$64.00	\$0.00	\$565.00 \$565.00

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Link to Benefit History Reports

Figure 11. Household Income Summary Screen

The screen shows the following summary benefit amounts for each family member:

- Gross and Net Monthly Social Security (SS)
 - Supplemental Security Income (SSI)—including Federal and State
 - Dual Entitlement (DE)
 - Combined (SS, SSI, and DE) Gross and Net
5. Click on the **View Benefit History** link to view the detailed Benefit History Report(s) for the household members. The Benefit History Report(s) for the household are displayed as shown below. The reports describe the Social Security, Supplemental Security Income, Medicare, Dual Entitlement, and Black Lung benefits being received by the tenant. It also provides a history of past benefit amounts.



The reports are sorted by Member Number. Scroll down the page to view the individual reports for each family member. A sample Benefit History Report is shown in Appendices V (PHA) and VI (O/A). Appendix VII contains a description of the data shown on the report.

SOCIAL SECURITY AND
SUPPLEMENTAL SECURITY INCOME

BENEFIT HISTORY REPORT FOR (RE)CERTIFICATIONS DUE [2003/00]

HA Code: LA001 Housing Authority: HOUSING AUTHORITY OF NEW ORLEANS
Project: LA001002 Program Type: Public Housing

[For Reference Only]

Head of Household: **JACK TENANT** Address: 2700 MAIN STREET #3C
[Click to submit benefit verification results] NEW ORLEANS, LA 70115
SSN: 123-45-6789

[Information below applies to this family member]

Family Member: JACK TENANT
SSN: 123-45-6789 Date of Birth: 01/16/1972

Social Security Benefits

Payment Status Code: C - Current Payment Status Benefit History

Date of Current Entitlement: NONE Date Gross Benefit

Done Local intranet

Figure 12. Benefit History Report Screen

6. If an Income Discrepancy Report has been generated for the household, the screen will display a link to the report as shown below.

field reviews

resources

► help

► download html scissors

► about income verification

► reac

► hud home

► data definition

► contact us

HH SSN: 123-45-6789 | HH Name: JANE RESIDENT | View Benefit History View Income Discrepancy

Member SSN	Member Name	SS Gross Net	**SSI	*DE	Total Gross Net
123-45-6789	JANE RESIDENT	\$143.00 \$143.00	\$0.00	\$0.00	\$143.00 \$143.00
123-45-7777	CAROL RESIDENT	\$0.00 \$0.00	\$545.00	\$0.00	\$545.00 \$545.00

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Link to the Income Discrepancy Report

Figure 13. Household Income Summary screen with Income Discrepancy Report link

7. Click on the **View Income Discrepancy** link to view the detailed Income Discrepancy Report for the household. The Income Discrepancy Report for the household is displayed as shown below. The report details the tenant-reported benefit amount, the SSA-reported benefit amount, and the difference in the amounts for each family member and for the combined household.

A sample Income Discrepancy Report is shown in Appendices VIII (PHAs) and IX (O/As). Appendix X contains a description of the data shown on the report.



Monthly Income Discrepancy

INCOME DISCREPANCY REPORT FOR (RE)CERTIFICATIONS DURING THE MONTH OF [2003/08]
FDR OFFICIAL USE ONLY

HA Code: LA001	Housing Authority: HOUSING AUTHORITY OF NEW ORLEANS
Project: LA001003	Program Type: Public Housing

Head of Household: **BROWN, JOHN** Address: 1900 MAIN STREET #8A
[Click to submit benefit verification results.] NEW ORLEANS, LA 70115

SSN: 123-33-3333

Family Member:

SSN	Name	Date of Birth
123-22-2222	BROWN, MARY	05/18/1992
123-77-8888	BROWN, HENRY	10/27/1994

Benefits Reported to HUD
No Benefits Reported to HUD

Benefits Reported by SSA

Done Local intranet

Figure 14. Income Discrepancy Report Screen

8. If there is no household in the selected PHA, Project, or Contract with a Head of Household SSN that matches the one entered by the user, the screen will display a message as shown below.

tenant assessment subsystem July 23, 2003

Home > Monthly Reports > Monthly Reports by Household > Summary by Household help

Household Income Summary

PHA	'LA001' - HOUSING AUTHORITY OF NEW ORLEANS
Re-certification Month	No record found for HH SSN: 123456789

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home
benefit history reports
 > by household
 > by pha
 > by fha contract
 > by fha project
field reviews
resources
 > help
 > download.html

"No record found" message

Figure 15. "No Record Found" Screen

Verify that you correctly entered the Head of Household SSN, selected the appropriate PHA, Project, or Contract and that the household is due for re-certification within the next four months.



Note

There may be no Benefit History Reports available for a household or a family member because of the following reasons:

- A HUD Form 50058/50059 was not submitted to HUD by the POA
- The Form 50058/50059 data contained mismatched identifiers for the tenant so the SSA could not provide benefit information
- The Household is not due for re-certification in any of the months for which benefit data is provided online
- The Household does not fall under the jurisdiction of the selected PHA, Project, or Contract

9. If the SSA was unable to provide benefit information for a family member, the screen will display a message as shown below. Appendix XI provides a complete listing of the error messages that may be generated and displayed by the system.

benefit history reports
 > by household
 > by pha
 > by fha contract
 > by fha project

field reviews

resources
 > help
 > download html
 > scissors
 > about income
 > verification
 > reac
 > hud home
 > data definition
 > contact us

secure systems main menu
logout

“Error” message

Household Income Summary						
Contract		WA160018002				
Re-certification Month		September, 2003				
HH SSN: 123-45-6789 HH Name: MARY BROWN View Benefit History View Income Discrepancy						
Member SSN	Member Name	*SS Gross Net	**SSI	*DE	Total Gross Net	
123-45-6789	MARY BROWN	\$0.00 \$0.00	\$550.45	\$0.00	\$550.45 \$550.45	
123-45-6666	SUE BROWN	\$0.00 \$0.00	\$550.45	\$0.00	\$550.45 \$550.45	
Member SSN	Member Name	Error Description				
123-45-5555	JOHN BROWN	Verification failed – SS benefits cannot be disclosed due to discrepancy in date of birth				
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Figure 16. Household Income Summary screen with Error Report



B. Accessing Monthly Reports by PHA

A search by PHA and Recertification Month will yield records for all the households under the PHA's jurisdiction that are due for re-certification in the specified month. Use the following steps to search by PHA and Re-certification Month:

1. Click the **by pha** link under the Benefit History Reports section of the system menu.

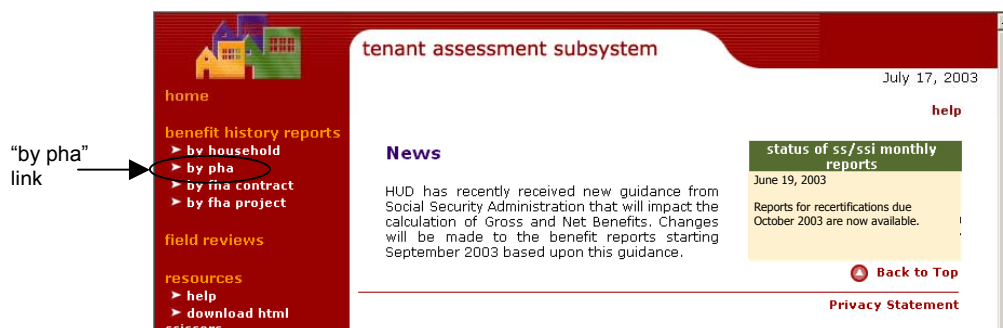
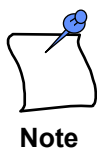


Figure 17. TASS Home Page



Note

If you get a message indicating that no PHA is assigned to you, you should contact the Secure Systems Coordinator of your PHA, who is able to grant you the necessary rights.

2. The **Monthly Reports by PHA** search screen is displayed as shown below.



Figure 18. Monthly Reports by PHA Search Screen



The **Select PHA** drop-down list is populated with the PHA(s) that you are authorized to access.

The **Select Program** drop-down list allows you to access reports for households participating in all PIH programs or to narrow your search to households participating in Public Housing or Section 8 programs.

The **Select Re-certification Month** drop-down list allows you to choose to view reports for households due for re-certification in the current month or in one of the four ensuing months.

3. To specify the group of households for which you want to access benefit records:
 - Select a **PHA** from the list of authorized PHAs
 - Select a specific category of rental assistance **program** or the default option “All PIH Programs”
 - Select the desired **Re-certification Month**
 - Click the **Go** link
4. The search results are displayed in the lower half of the screen—the **Monthly Reports Summary** as shown below.

Monthly Reports Summary		
PHA	'LA001' - HOUSING AUTHORITY OF NEW ORLEANS	
Program	All PIH Programs	
Re-certification Month	August, 2003	
Report Type	Number of Households	Number of Members
Benefit History Reports	352	435
Income Discrepancy Reports	37	55
Error Reports	0	0

Figure 19. Monthly Reports by PHA Summary screen

The summary shows the number of households and family members for whom Benefit History, Income Discrepancy, and Error Reports are available for the user-defined search criteria.

If there are no households included in the search results for a report type, the report name is displayed with “0” in the Number of Households and Number of Family Members columns



If at least one household is included in the search results for a report type, the report name becomes an active link that allows you to view the summary information for all the included households.

B-1 Benefit History Reports

1. To view the summary benefit information, click the **Benefit History Reports** link.

The **Benefit Summary by PHA** screen is displayed as shown below.

The screenshot displays the 'tenant assessment subsystem' interface. The main content area is titled 'Benefit Summary by PHA' and shows a summary of benefits for three households. The left sidebar contains navigation links for 'home', 'benefit history reports', 'field reviews', 'resources', 'secure systems main menu', and 'logout'. The main content area includes a breadcrumb trail: 'Home > Monthly Reports > Monthly Reports by PHA > Benefit Summary by PHA'. Below this, there is a table with the following data:

PHA	'LA001' - HOUSING AUTHORITY OF NEW ORLEANS					
Program	All PIH Programs					
Re-certification Month	August, 2003					
Households Receiving Benefits	352					
<input type="button" value="View Reports on All Households"/> <input type="button" value="Go"/>						
Previous 51 - 100 of 352 Households Next						
HH SSN: 123-45-6789 HH Name: JACK TENANT **PH Project Number: LA001005 View Detail						
Member SSN	Member Name	*SS Gross Net	**SSI	+DE	Total Gross Net	
123-45-6789	JACK TENANT	\$177.00 \$177.00	\$0.00	\$0.00	\$177.00 \$177.00	
123-45-6788	JANE TENANT	\$0.00 \$0.00	\$545.00	\$0.00	\$545.00 \$545.00	
123-45-6777	MARY TENANT	\$0.00 \$0.00	\$545.00	\$0.00	\$545.00 \$545.00	
HH SSN: 123-45-5555 HH Name: CAROLINE PUBLIC Project Number: LA001005 View Detail						
Member SSN	Member Name	*SS Gross Net	**SSI	+DE	Total Gross Net	
123-45-5555	CAROLINE PUBLIC	\$589.00 \$535.00	\$0.00	\$0.00	\$589.00 \$535.00	
HH SSN: 123-44-4444 HH Name: MANUEL RESIDENT **PH Project Number: LA001005 View Detail						
Member SSN	Member Name	*SS Gross Net	**SSI	+DE	Total Gross Net	
123-44-4444	MANUEL RESIDENT	\$518.40 \$459.00	\$0.00	\$0.00	\$518.40 \$459.00	

Figure 20. Benefit Summary by PHA screen

The search results are displayed as summaries of the Benefit History Reports for the family member(s) in each household. The screen shows the following benefit amount information for each family member:

- Gross and Net Monthly Social Security (SS)
- Supplemental Security Income (SSI)—including Federal and State
- Dual Entitlement (DE)
- Combined (SS, SSI, and DE) Gross and Net

The results are sorted by Program Type and Head of Household SSN.



A maximum of 50 summaries are displayed on the screen. Where there are more than 50 reports in the search results, the screen has **Next** and **Previous** navigation buttons to allow you to access the next or previous set of reports.

2. The Benefit Summary by PHA screen provides three options for accessing the detailed Benefit History Reports. These options are described in Section E.

B-2 Income Discrepancy Reports

1. To view the summary income discrepancy information, click the **Income Discrepancy Reports** link.

The **Discrepancy Summary by PHA** screen is displayed as shown below.

The screenshot shows the 'tenant assessment subsystem' interface. The main content area is titled 'Discrepancy Summary by PHA'. It includes a summary table with columns for PHA, Program, Re-certification Month, and Households With Income Discrepancy. Below this, there are three detailed tables, each for a different household (HH SSN: 123-33-3333, 123-99-9999, and 123-22-5555). Each table lists member SSNs, names, and the benefits reported to HUD and SSA.

PHA	Program	Re-certification Month	Households With Income Discrepancy
'LA001' - HOUSING AUTHORITY OF NEW ORLEANS	All PIH Programs	August, 2003	37

View Reports on All Households [Go]

HH SSN: 123-33-3333	HH Name: BROWN, JOHN	**PH Project Number: LA001003	View Detail
Member SSN	Member Name	Benefits Reported to HUD	Benefits Reported by SSA
123-33-3333	BROWN, JOHN	\$0.00	\$131.00
123-77-8888	BROWN, HENRY	\$0.00	\$131.00

HH SSN: 123-99-9999	HH Name: DOE, JONATHAN	**PH Project Number: LA001003	View Detail
Member SSN	Member Name	Benefits Reported to HUD	Benefits Reported by SSA
123-99-9999	DOE, JONATHAN	\$610.00	\$626.00
123-99-8888	DOE, JOELYN	\$0.00	\$626.00

HH SSN: 123-22-5555	HH Name: SMITH, TED	**PH Project Number: LA001004	View Detail
Member SSN	Member Name	Benefits Reported to HUD	Benefits Reported by SSA
123-22-5555	SMITH, TED	\$0.00	\$545.00

Figure 21. Income Discrepancy Summary by PHA screen

The search results are displayed as summaries of the Income Discrepancy Reports for each family member. The screen shows the following information for each family member:

- Total Benefits Reported to HUD by the Tenant
- Total Benefits Reported to HUD by the SSA

The results are sorted by Program Type and Head of Household SSN.



A maximum of 50 summaries are displayed on the screen. Where there are more than 50 reports in the search results, the screen has **Next** and **Previous** navigation buttons to allow you to access the next or previous set of reports.

2. The Discrepancy Summary by PHA screen provides three options for accessing the detailed Income Discrepancy Reports. These options are described in Section E.

B-3 Error Reports

1. To view the list of tenants for whom TASS was unable to provide benefit information and the reason for the missing information, click the **Error Reports** link.

The **Error Report** screen is displayed as shown below.

<div>benefit history reports</div> <div>> by household</div> <div>> by pha</div> <div>> by fha contract</div> <div>> by fha project</div> <div>field reviews</div> <div>resources</div> <div>> help</div> <div>> download html</div> <div>scissors</div> <div>> about income</div> <div>verification</div> <div>> reac</div> <div>> hud home</div> <div>> data definition</div> <div>> contact us</div> <div>secure systems main</div> <div>menu</div> <div>logout</div>	Error Report by PHA		
	PHA	'LA001' - HOUSING AUTHORITY OF NEW ORLEANS	
	Program	All PIH Programs	
	Re-certification Month	September, 2003	
	Households with Errors	732	
	1 - 50 of 732 Households		Next
	HH SSN: 123-33-3333 HH Name:		
	Member SSN	Member Name	Error Description
	123-33-3333	MARTIN JONES	No benefits reported by SSA
	HH SSN: 122-22-2222 HH Name:		
	Member SSN	Member Name	Error Description
	122-22-2222	SUE TENANT	Verification failed - SSI benefits cannot be disclosed due to discrepancy in name
	888-88-1111	DEBBY TENANT	No benefits reported by SSA
	HH SSN: 444-44-4444 HH Name:		
	Member SSN	Member Name	Error Description
	444-44-4444	SARA DOE	Verification failed - SS benefits cannot be disclosed due to discrepancy in date of birth
	HH SSN: 777-77-1234 HH Name:		
	Member SSN	Member Name	Error Description
	777-77-1234	JOHN PUBLIC	Verification failed - Date of birth matched, but surname did not match with SSA records
	777-77-1235	MARIA PUBLIC	Verification failed - SSN not found in SSA records
	777-77-1236	PAUL PUBLIC	Verification failed - Surname matched, but date of birth did not match with SSA records

Figure 22. Error Reports screen

The results are sorted by Program Type and Head of Household SSN.

2. The SSA may not be able to provide benefit information for a tenant for various reasons including the following:
 - The tenant's SSN could not be verified—the SSN/date of birth/surname combination does not match SSA records.
 - The tenant's SSN was verified but the tenant does not currently receive benefits and has never received benefits in the past.
3. Appendix XI provides a complete listing of the error messages that may be generated and displayed by the system.



C. Accessing Monthly Reports by FHA Contract Number

A search by FHA Contract Number and Recertification Month will yield records for all the households under the O/A's jurisdiction that are due for re-certification in the specified month. Use the following steps to search by FHA Contract Number and Re-certification Month:

1. Click the **by fha contract** link under the Benefit History Reports section of the system menu.

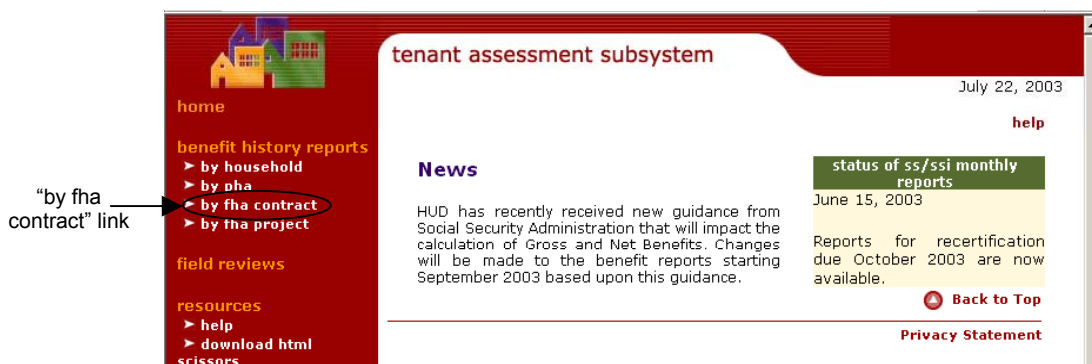


Figure 23. TASS Home Page



Note

If you get a message indicating that no contract numbers are assigned to you, contact the Secure Systems Coordinator of your organization who is able to provide you with the necessary rights.

2. The **Monthly Reports by Contract** screen is displayed as shown below.

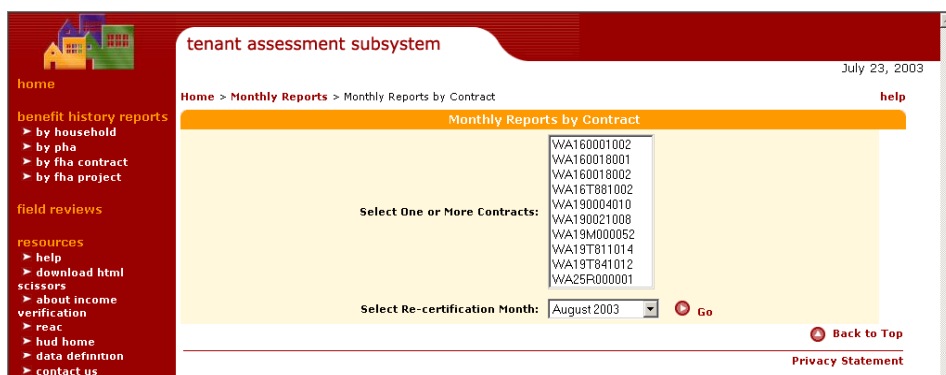


Figure 24. Monthly Reports by Contract Search Screen



The **Select One or More Contracts** drop-down list is populated with the contract(s) that you are authorized to access.

The **Select Re-certification Month** drop-down list allows you to choose reports for households due for re-certification in the current month or in one of the four ensuing months.



Note

If you do not see the contract number for a particular property you own or manage, you should contact the Secure Systems Coordinator of your organization.

3. To specify the group of households for which you want to access benefit records:
 - Select one or more **Contract Numbers** from the list of authorized contracts
 - Select the desired **Re-certification Month**
 - Click the **Go** link



Note

You may choose multiple, consecutive contract numbers in the list by holding down the **Shift** key on your keyboard and selecting the required contract numbers by dragging the mouse through the list or using your **Up** or **Down** arrows. You may select multiple, nonconsecutive contract numbers by holding down the **Ctrl** key as you make the selections.

4. The search results are displayed in the lower half of the screen—the **Monthly Reports Summary** as shown below.

Active links to available reports are shown in red

Monthly Reports by Contract				
Select One or More Contracts:				
WA160001002 WA160018001 WA160018002 WA16T881002 WA190004010 WA190021008 WA19M000052 WA19T811014 WA19T841012 WA25R000001				
Select Re-certification Month: August 2003				
Go				
Monthly Reports Summary				
Contracts	WA160001002, WA160018001, WA160018002, WA16T881002			
Re-certification Month	August 2003			
Report Type	Number of Households	Number of Members		
Benefit History Reports	22	24		
Income Discrepancy Reports	1	1		
Error Reports	0	0		

Figure 25. Monthly Reports by Contract Summary Screen



The summary shows the number of households and family members for whom Benefit History, Income Discrepancy, and Error Reports are available for the specified contract number(s) and re-certification month.

If there are no households included in the search results for a report type, the report name is displayed with “0” in the Number of Households and Number of Family Members columns

If at least one household is included in the search results for a report type, the report name becomes an active link that allows you to view the summary information for all the included households.

C-1 Benefit History Reports

1. To view the summary benefit information, click the **Benefit History Reports** link under the **Report Type** column.

The **Benefit Summary by Contract** screen is displayed as shown below.

Benefit Summary by Contract							
Contracts		WA160001002, WA160018001, WA160018002, WA16T881002					
Re-certification Month		August 2003					
Households Receiving Benefits		22					
View Reports on All Households Go							
1 - 22 of 22 households							
Benefit Summary for Contract: WA160001002							
HH SSN: 123-45-6789 HH Name: JANE RESIDENT View Detail							
Member SSN	Member Name	SS Gross Net	SSI	DE	Total Gross Net		
123-45-6789	JANE RESIDENT	\$0.00 \$0.00	\$545.00	\$0.00	\$545.00 \$545.00		
HH SSN: 123-45-9999 HH Name: JOE BROWN View Detail							
Member SSN	Member Name	SS Gross Net	SSI	DE	Total Gross Net		
123-45-9999	JOE BROWN	\$696.40 \$637.00	\$0.00	\$0.00	\$696.40 \$637.00		
HH SSN: 123-45-7777 HH Name: MARY PUBLIC View Detail							
Member SSN	Member Name	SS Gross Net	SSI	DE	Total Gross Net		
123-45-7777	MARY PUBLIC	\$819.00 \$819.00	\$0.00	\$0.00	\$819.00 \$819.00		
HH SSN: 123-45-8888 HH Name: LISA TENANT View Detail							
Member SSN	Member Name	SS	SSI	DE	Total		

Figure 26. Benefit Summary by Contract Screen

The search results are displayed as summaries of the Benefit History Reports for the family member(s) in each household. The screen shows the following benefit amount information for each family member:

- Gross and Net Monthly Social Security (SS)
- Supplemental Security Income (SSI)—including Federal and State
- Dual Entitlement (DE)
- Combined (SS, SSI, and DE) Gross and Net



The summaries are sorted by Contract Number and Head of Household SSN.

A maximum of 50 summaries are displayed on the screen. Where there are more than 50 reports in the search results, the screen has **Next** and **Previous** navigation buttons to allow you to access the next or previous set of reports.

2. The Benefit Summary by Contract screen provides three options for accessing the detailed Benefit History Reports. These options are described in Section E.

C-2 Income Discrepancy Reports

1. To view the summary income discrepancy information, click the **Income Discrepancy Reports** link.

The **Discrepancy Summary by Contract** screen is displayed as shown below.

Discrepancy Summary by Contract

Contracts	WA160001002, WA160018002, WA19T811014
Re-certification Month	September 2003
Households With Income Discrepancy	2

View Reports on All Households

1 - 2 of 2 households

Income Discrepancy Summary for Contract: WA160001002

HH SSN: 123-45-6789 HH Name: JANE SMITH		Benefits Reported to HUD	Benefits Reported by SSA	View Detail
Member SSN	Member Name			
123-45-6789	SMITH, JANE	\$639.00	\$1,617.00	

Income Discrepancy Summary for Contract: WA160018002

HH SSN: 123-45-9999 HH Name: JOE BROWN		Benefits Reported to HUD	Benefits Reported by SSA	View Detail
Member SSN	Member Name			
123-45-9999	BROWN, JOE	\$0.00	\$552.00	
123-45-8888	BROWN, MARY	\$552.00	\$552.00	

Income Discrepancy Summary for Contract: WA19T811014

HH SSN: 123-45-7777 HH Name: LISA DOE		Benefits Reported to HUD	Benefits Reported by SSA	View Detail
Member SSN	Member Name			
123-45-7777	DOE, LISA	\$350.42	\$516.80	

1 - 2 of 2 households

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Figure 27. Income Discrepancy Summary by Contract screen

The search results are displayed as summaries of the Income Discrepancy Reports for each family member. The screen shows the following information for each family member:

- Total Benefits Reported to HUD by the Tenant
- Total Benefits Reported to HUD by the SSA

The results are sorted by Contract Number and Head of Household SSN.



A maximum of 50 summaries are displayed on the screen. Where there are more than 50 reports in the search results, the screen has **Next** and **Previous** navigation buttons to allow you to access the next or previous set of reports.

2. The Discrepancy Summary by Contract screen provides three options for accessing the detailed Income Discrepancy Reports. These options are described in Section E.

C-3 Error Reports

1. To view the list of tenants for whom TASS was unable to provide benefit information and the reason for the missing information, click the **Error Reports** link.

The **Error Report** screen is displayed as shown below.

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- by pha
- by fha contract
- by fha project

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Error Report by Contract

Contracts	WA160001002, WA160018002, WA19T811014	
Re-certification Month	September 2003	
Households With Errors	3	

1 - 3 of 3 households

Error Report for Contract: WA160001002

HH SSN: 122-22-2222 | HH Name: |

Member SSN	Member Name	Error Description
122-22-2222	SUE TENANT	Verification failed - SSI benefits cannot be disclosed due to discrepancy in name
888-88-1111	DEBBY TENANT	No benefits reported by SSA

Error Report for Contract: WA160018002

HH SSN: 444-44-4444 | HH Name: |

Member SSN	Member Name	Error Description
444-44-4444	SARA DOE	Verification failed - SS benefits cannot be disclosed due to discrepancy in date of birth

Error Report for Contract: WA19T811014

HH SSN: 777-77-1234 | HH Name: |

Member SSN	Member Name	Error Description
777-77-1234	JOHN PUBLIC	Verification failed - Date of birth matched, but surname did not match with SSA records
777-77-1235	MARIA PUBLIC	Verification failed - SSN not found in SSA records
777-77-1236	PAUL PUBLIC	Verification failed - Surname matched, but date of birth did not match with SSA records

Figure 28. Error Report by Contract screen

The results are sorted by Contract Number and Head of Household SSN.

2. The SSA may not be able to provide benefit information for a tenant for various reasons including the following:
 - The tenant's SSN could not be verified—the SSN/date of birth/surname combination does not match SSA records.
 - The tenant's SSN was verified but the tenant does not currently receive benefits and has never received benefits in the past.
3. Appendix XI provides a complete listing of the error messages that may be generated and displayed by the system.



D. Accessing Monthly Reports by FHA Project Number

A search by FHA Project Number and Recertification Month will yield records for all the households under the O/A's jurisdiction that are due for re-certification in the specified month. Use the following steps to search by FHA Project Number and Re-certification Month:

1. Click the **by fha project** link under the **Benefit History reports** section of the system menu.

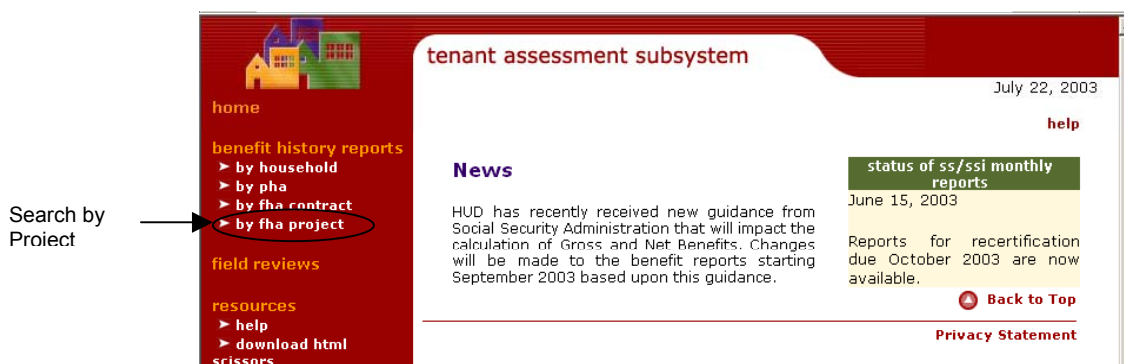


Figure 29. TASS Home Page



Note

If you get a message indicating that no projects are assigned to you, contact the Secure Systems Coordinator of your organization who is able to provide you with the necessary rights.

2. The **Monthly Reports by Project** screen is displayed as shown below.

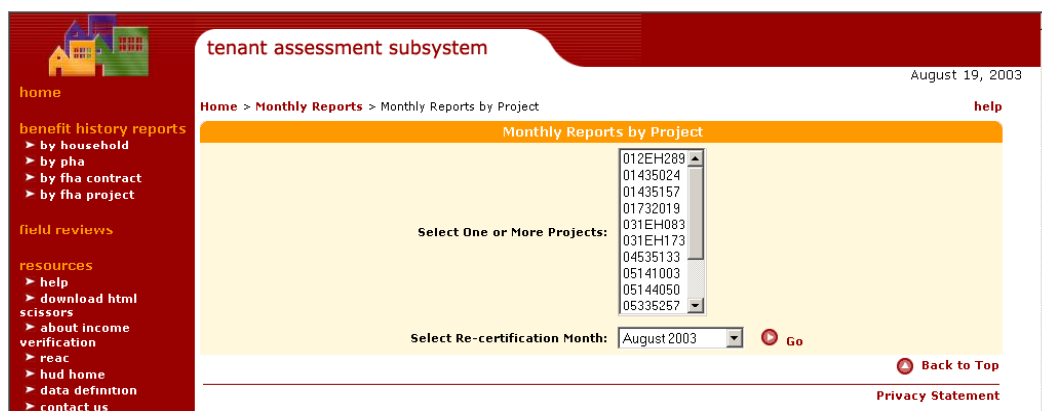


Figure 30. Monthly Reports by Project Search Screen



The **Select One or More Projects** drop-down list is populated with the project(s) that you are authorized to access.

The **Select Re-certification Month** drop-down list allows you to choose reports for households due for re-certification in the current month or in one of the four ensuing months.



Note

If you do not see the project number for a particular property you own or manage, you should contact the Secure Systems Coordinator of your organization.

3. To specify the group of households for which you want to access benefit records:

- Select one or more **Project Numbers** from the list of authorized projects
- Select the desired **Re-certification Month**
- Click the **Go** link



Note

You may choose multiple, consecutive project numbers in the list by holding down the **Shift** key on your computer keyboard and selecting the required project numbers by dragging the mouse through the list or using your **Up** or **Down arrows**. You may select multiple, nonconsecutive project numbers by holding down the **Ctrl** key as you make the selections.

4. The search results are displayed in the lower half of the screen—the **Monthly Reports Summary** as shown below.

Active links to available reports are shown in red

Monthly Reports Summary		
Projects	012EH289, 01435024, 01435157, 01732019, 031EH083, 031EH173	
Re-certification Month	September 2003	
Report Type	Number of Households	Number of Members
Benefit History Reports	37	42
Income Discrepancy Reports	2	2
Error Reports	19	37

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Figure 31. Monthly Reports by Project Summary Screen



The summary shows the number of households and family members for whom Benefit History, Income Discrepancy, and Error Reports are available for the specified project number(s) and re-certification month.

If there are no households included in the search results for a report type, the report name is displayed with “0” in the Number of Households and Number of Family Members columns

If at least one household is included in the search results for a report type, the report name becomes an active link that allows you to view the summary information for all the included households.

D-1 Benefit History Reports

1. To view the summary benefit information, click the **Benefit History Reports** link under the **Report Type** column.

The **Benefit Summary by Project** screen is displayed as shown below.

Benefit Summary by Project						
Projects		012EH289, 01435024, 01435157, 01732019, 031EH083, 031EH173				
Re-certification Month		September 2003				
Number of Households With Benefits		37				
<input type="text" value="View Reports on All Households"/> <input type="button" value="Go"/>						
1 - 37 of 37 households						
Benefit Summary for Project: 01435024						
HH SSN: 123-45-6789 HH Name: DONNA RESIDENT View Detail						
Member SSN	Member Name	SS Gross Net	SSI	DE	Total Gross Net	
123-45-6789	DONNA RESIDENT	\$0.00 \$0.00	\$575.00	\$0.00	\$575.00 \$575.00	
HH SSN: 123-45-9999 HH Name: JOHN BROWN View Detail						
Member SSN	Member Name	SS Gross Net	SSI	DE	Total Gross Net	
123-45-9999	JOHN BROWN	\$608.00 \$608.00	\$51.00	\$0.00	\$659.00 \$659.00	
Benefit Summary for Project: 01732019						
HH SSN: 123-45-5555 HH Name: AMY PUBLIC View Detail						
Member SSN	Member Name	SS Gross Net	SSI	DE	Total Gross Net	
123-45-5555	AMY PUBLIC	\$1,154.00 \$1,154.00	\$0.00	\$0.00	\$1,154.00 \$1,154.00	

Figure 32. Benefit Summary by Project Screen

The search results are displayed as summaries of the Benefit History Reports for the family member(s) in each household. The screen shows the following benefit amount information for each family member:

- Gross and Net Monthly Social Security (SS)
- Supplemental Security Income (SSI)—including Federal and State
- Dual Entitlement (DE)
- Combined (SS, SSI, and DE) Gross and Net



The summaries are sorted by Project Number and Head of Household SSN.

A maximum of 50 summaries are displayed on the screen. Where there are more than 50 reports in the search results, the screen has **Next** and **Previous** navigation buttons to allow you to access the next or previous set of reports.

2. The Benefit Summary by Project screen provides three options for accessing the detailed Benefit History Reports. These options are described in Section E.

D-2 Income Discrepancy Reports

1. To view the summary income discrepancy information, click the **Income Discrepancy Reports** link.

The **Discrepancy Summary by Project** screen is displayed as shown below.

benefit history reports

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- by fha contract
- by fha project

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Discrepancy Summary Project

Projects	012EH289, 01435024, 01435157, 01732019, 031EH083, 031EH173
Re-certification Month	September 2003
Households With Income Discrepancy	2

View Reports on All Households

1 - 2 of 2 households

Income Discrepancy Summary for Project: 01435024

HH SSN: 123-45-6789	HH Name: SMITH, TERRY	View Detail	
Member SSN	Member Name	Benefits Reported to HUD	Benefits Reported by SSA
123-45-6789	SMITH, TERRY	\$52.00	\$608.00

Income Discrepancy Summary for Project: 01732019

HH SSN: 123-45-6666	HH Name: JONES, JOHN	View Detail	
Member SSN	Member Name	Benefits Reported to HUD	Benefits Reported by SSA
123-45-6666	JONES, JOHN	\$545.00	\$1,055.00

Records 1 to 2 of 2 Total Households

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[Privacy Statement](#)

Figure 33. Income Discrepancy Summary by Project screen

The search results are displayed as summaries of the Income Discrepancy Reports for each family member. The screen shows the following information for each family member:

- Total Benefits Reported to HUD by the Tenant
- Total Benefits Reported to HUD by the SSA

The results are sorted by Project Number and Head of Household SSN.



A maximum of 50 summaries are displayed on the screen. Where there are more than 50 reports in the search results, the screen has **Next** and **Previous** navigation buttons to allow you to access the next or previous set of reports.

2. The Discrepancy Summary by Project screen provides three options for accessing the detailed Income Discrepancy Reports. These options are described in Section E.

D-3 Error Reports

1. To view the list of tenants for whom TASS was unable to provide benefit information and the reason for the missing information, click the **Error Reports** link.

The **Error Report** screen is displayed as shown below.

Error Report by Project		
Projects	012EH289, 01435157, 01732019, 031EH083, 031EH173	
Re-certification Month	September 2003	
Households With Errors	19	
1 - 19 of 19 households		
Error Report for Project: 012EH289		
HH SSN: 122-22-2222 HH Name:		
Member SSN	Member Name	Error Description
122-22-2222	SUE TENANT	Verification failed - SS1 benefits cannot be disclosed due to discrepancy in name
888-88-1111	DEBBY TENANT	No benefits reported by SSA
Error Report for Project: 01435157		
HH SSN: 444-44-4444 HH Name:		
Member SSN	Member Name	Error Description
444-44-4444	SARA DOE	Verification failed - SS benefits cannot be disclosed due to discrepancy in date of birth
Error Report for Project: 031EH083		
HH SSN: 777-77-1234 HH Name:		
Member SSN	Member Name	Error Description
777-77-1234	JOHN PUBLIC	Verification failed - Date of birth matched, but surname did not match with SSA records
777-77-1235	MARIA PUBLIC	Verification failed - SSN not found in SSA records
777-77-1236	PAUL PUBLIC	Verification failed - Surname matched, but date of birth did not match with SSA records

Figure 34. Error Reports screen

The results are sorted by Project Number and Head of Household SSN.

2. The SSA may not be able to provide benefit information for a tenant for various reasons including the following:
 - The tenant's SSN could not be verified—the SSN/date of birth/surname combination does not match SSA records.
 - The tenant's SSN was verified but the tenant does not currently receive benefits and has never received benefits in the past.
3. Appendix XI provides a complete listing of the error messages that may be generated and displayed by the system.



E. Viewing the Detailed Reports

The Benefit Summary and Discrepancy Summary screens provide three options for accessing the detailed Benefit History and Income Discrepancy Reports:

1. To view the detailed report for a specific household, click the **View Detail** link in the summary page (Benefit Summary by PHA, Contract, or Project; Discrepancy Summary by PHA, Contract, or Project).

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- by pha contract
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Benefit Summary by PHA

PHA: 'LA001' - HOUSING AUTHORITY OF NEW ORLEANS

Program: All PIH Programs

Re-certification Month: August, 2003

Households Receiving Benefits: 352

View Reports on All Households [Go]

Previous 51 - 100 of 352 Households Next

Member SSN	Member Name	*SS Gross Net	**SSI	*DE	Total Gross Net
123-45-6789	JACK TENANT	\$177.00 \$177.00	\$0.00	\$0.00	\$177.00 \$177.00
123-45-6788	JANE TENANT	\$0.00 \$0.00	\$545.00	\$0.00	\$545.00 \$545.00
123-45-6777	MARY TENANT	\$0.00 \$0.00	\$545.00	\$0.00	\$545.00 \$545.00

HH SSN: 123-45-6789 | HH Name: JACK TENANT | **PH Project Number: LA001005 | [View Detail](#)

Member SSN	Member Name	*SS Gross Net	**SSI	*DE	Total Gross Net
123-45-5555	CAROLINE PUBLIC	\$589.00 \$535.00	\$0.00	\$0.00	\$589.00 \$535.00

HH SSN: 123-45-5555 | HH Name: CAROLINE PUBLIC | PH Project Number: LA001005 | [View Detail](#)

Figure 35. Benefit Summary by PHA screen

- a. For Benefit History Reports, this displays the detailed Benefit History Report(s) for all members of the household, where available. The reports describe the Social Security, Supplemental Security Income, Medicare, Dual Entitlement, and Black Lung benefits being received by the tenant. It also provides a history of past benefit amounts.

The Benefit History Report page is shown below. The reports are sorted by Member Number with the Head of Household's report being the first on the page. Scroll down the page to view the individual reports for each family member. You may print the household's reports or save the report file to a local computer hard drive or diskette for later viewing and printing.

A sample Benefit History Report is shown in Appendices V (for PHAs) and VI (for O/As). Appendix VII contains a description of the data shown on the report.



**SOCIAL SECURITY AND
SUPPLEMENTAL SECURITY INCOME**

BENEFIT HISTORY REPORT FOR (RE)CERTIFICATIONS DUE [2003/08]

HA Code: LA001	Housing Authority: HOUSING AUTHORITY OF NEW ORLEANS
Project: LA001002	Program Type: Public Housing
[For Reference Only]	
Head of Household: JACK TENANT [Click to submit benefit verification results] SSN: 123-45-6789	Address: 2700 MAIN STREET #3C NEW ORLEANS, LA 70115
[Information below applies to this family member]	
Family Member: JACK TENANT SSN: 123-45-6789	Date of Birth: 01/16/1972

Social Security Benefits

Payment Status Code: C - Current Payment Status	Benefit History
Date of Current Entitlement: 04/01/04	Date Gross Benefit

Done Local Intranet

Figure 36. Benefit History Report Screen

- b. For Income Discrepancy Reports, this displays the detailed report for the household as shown below. The report details the tenant-reported benefit amount, the SSA-reported benefit amount, and the difference in the amounts for each family member and for the combined household. You may print the household's report or save the report file to a local computer hard drive or diskette for later viewing and printing.

A sample Income Discrepancy Report is shown in Appendices VIII (for PHAs) and IX (for O/As). Appendix X contains a description of the data shown on the report.

Monthly Income Discrepancy

INCOME DISCREPANCY REPORT FOR (RE)CERTIFICATIONS DURING THE MONTH OF [2003/08]
FOR OFFICIAL USE ONLY

HA Code: LA001	Housing Authority: HOUSING AUTHORITY OF NEW ORLEANS
Project: LA001003	Program Type: Public Housing
Head of Household: [Click to submit benefit verification results] SSN: 123-33-3333	Address: 1900 MAIN STREET #8A NEW ORLEANS, LA 70115
Family Member:	
SSN	Name Date of Birth
123-22-2222	BROWN, MARY 05/16/1992
123-77-8888	BROWN, HENRY 10/27/1994

Benefits Reported to HUD
No Benefits Reported to HUD

Benefits Reported by SSA

Done Local Intranet

Figure 37. Income Discrepancy Report Screen



Note

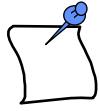
You should be aware that once a report is saved to your local diskette or hard drive, it is no longer in HUD's secure environment. You must take precautions to prevent access to the reports by unauthorized individuals.

- To view the detailed reports for all households in the result set, select the **View Reports on All Households** option in the drop-down list and click the **Go** link. The reports are presented in groups of 50 with navigation buttons for viewing the next and previous set of reports. You may print or save the reports.

Member SSN	Member Name	*SS Gross Net	**SSI	*DE	Total Gross Net
123-45-6789	JOE TENANT	\$410.00 \$410.00	\$215.00	\$0.00	\$625.00 \$625.00

Figure 38. Summary Screen Showing Options for Viewing Report Details

- To download the SS/SSI benefits data, select the **Download SS/SSI Benefits zipped data file** or the **Download SS/SSI Benefits text data file** option from the drop-down list and click the **Go** link. These download options are particularly useful for PHAs with a large volume of tenant reports or who wish to load the data into another program such as Microsoft Access. The zipped data file (compressed format) greatly reduces the size of large files and reduces the download time. The time it takes to download the files will depend on the speed of your Internet connection. See Appendix XII for directions for downloading the data files.



Note

The data files that may be downloaded from the TASS online system are in tab-delimited format. That is, a tab character separates each field. Each record is delimited by a new-line. The **Data Definition** link under the **Resources** caption of the TASS web page provides the user with a description of the data files for each report type. The link allows the user to access a listing of the field names, type, and size and a brief description of each field in the Benefit History and Income Discrepancy reports. The fields are listed in the order they are written to the downloadable files.
